Fleet baseline & history

Build a shared baseline before comparing costs or changing maintenance. Use known records, mark unknowns and leave cost amounts blank if unavailable.

ORGANISATION / FLEET

PREPARED BY

REVIEW DATE

REVIEW PERIOD (FROM / TO)

LOCATION / OPERATING AREA

01 Define the fleet in scope

Unit or vehicle group	Vehicle count	Use / duty cycle	Approx. km per month	Record source

02 Gather the available history

- ☐ Service invoices / work orders
- ☐ Odometer and usage records
- ☐ Manufacturer maintenance schedule
- ☐ Fleet maintenance requirements
- ☐ Warranty information, if applicable
- ☐ Previous findings and approvals

HISTORY GAPS OR BASELINE NOTES

Cost gaps & questions

Record where a comparison is incomplete. A gap is a question to resolve; it does not establish avoidable cost or a saving.

03 Check what may be missing

- ☐ Service scope differs between records
- ☐ Oil specification or quantity is unclear
- ☐ Parts, filters or labour are unclear
- ☐ Visit fees, taxes or exclusions are unclear
- ☐ Travel, downtime or admin time is unknown
- ☐ Service history or repeat issue is unclear

04 Turn each gap into a record request

Observed gap / affected unit	Record needed or question to ask	Owner / due date

OPERATIONAL CONTEXT TO CONSIDER

Examples: access windows, vehicle availability, travel, scheduling or administrative effort.

Findings & actions

Keep the evidence separate from the interpretation. Use this page to record what was found, what remains uncertain and the agreed action.

FLEET / UNITS COVERED

REVIEW DATE / REFERENCE

05 Record the review

Finding and source / date	Meaning or open question	Agreed next step	Owner / due

06 Choose the next decision

- ☐ Gather additional records
- ☐ Clarify a quote or service scope
- ☐ Arrange a focused maintenance review
- ☐ Monitor and revisit on a set date

NEXT REVIEW DATE

DECISION OWNER

Review summary

Capture the current position and a practical follow-through plan. This summary is a planning record; it does not authorise vehicle work.

FLEET / REVIEW PERIOD

REVIEWER / DATE

RECORDS REVIEWED AND REFERENCE LOCATIONS

WHAT THE RECORDS SUPPORT

WHAT REMAINS UNCERTAIN OR OUTSIDE THIS REVIEW

07 Assign follow-through

Next action	Owner	Due date	Completion evidence

REVIEW STATUS

☐ Preliminary ☐ Follow-up required ☐ Ready for discussion